

How to Query Procedure



(For Campus Distribution)

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Purpose	Explains rules and methods of performing a query in Banner Finance and in Budget. Defines the functions used to perform queries.
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Query - Campus

Within a form, you can ask--or query--to find information that has been entered in Banner Finance. Before you perform a query, it is important to know how to formulate the query. There are several rules:

- Queries are literal and the system is case sensitive. Capitalization matters.
- Data is matched against the search criteria exactly as entered.
- The percent sign (%) stands for any amount of characters.
- The underline mark (_) stands for one occurrence of a character.
- Both "%" and "_" are called *wildcards*.

Query Functions

Use the following functions to perform queries:

Enter Query	Puts the form into query mode and lets you enter search criteria.
Execute Query	Searches the database and displays any records that match the search criteria.
Last Criteria	Enters the criteria from your last search. You can change any of the criteria. This function only works if you are in query mode.
Exit / Cancel Query	Cancel the query and takes the form out of query mode.
Count Query Hits	Counts the number of records that match the search criteria and displays that number in the Auto Hint message.
Fetch Next Set	Replaces the current set of displayed records with the next set of records if more records match the search criteria than will fit in the window.

How to Query

1. Access the form displaying the records you want to query. If the form opens in query mode, go directly to step 2. Otherwise, perform an Enter Query function (F-5) to put the form in query mode.
2. Enter the query (search) criteria. You can query information in any field that you can access. You can use the Oracle wildcards "%" and "_".
3. Perform an Execute Query function (F-6) to search the Banner database. All records that match the search criteria will be displayed.

Query - Campus

To get these results:	Enter this query:
All entries that contain <i>-ma-</i>	%ma%
All entries that begin with <i>ma</i>	ma%
All entries that have <i>ma</i> as the final two characters	%ma
All entries that have <i>m</i> as the second character	_m%

Querying on a Year

Specify all four digits when querying on a year field. For example, enter "1999," not "99."

Querying on a Specific Date

Banner™ Finance stores dates associated with a record with a stamp of the exact time the record was saved to the database. You cannot see the time stamp, but it is part of the date record and can affect the results of a query.

When you include a date in your query criteria, Banner™ Finance adds the time 00:00:00 to the query criteria. You will not get any matches with this time stamp, resulting in the message "Query caused no records to be retrieved. Re-enter." To get the results you want, use this method to enter the query criteria:

Use the "%" wildcard in your query criteria. Enter a "%", followed by the month (MMM), followed by "%", followed by the day (DD), followed by "%", followed by the year (YYYY), followed by "%". The formula looks like "%MMM%DD%YYYY%."

For example, if searching for a record that you previously entered on October 9, 1998, enter "%09%OCT%1999%." This will retrieve all records entered on that date. If you want to see all records entered in October 1998, enter "%OCT%1999%."

Query - Campus

Querying and Reviewing Budget Information

The two most frequently accessed query forms are the Organization Budget Status Form and the Organization Budget Summary Form.

- **Organization Budget Status Form (FWIBDST)**
This form is used as a budget query form and can be accessed through the budget menu in Banner™ Finance. It provides current information on your adjusted budget, year-to-date activity, budget commitments, and available balance. It also provides detailed information and can be used to access various types of documents that support the adjusted budget and year-to-date amounts. This form reflects information for the queried fiscal year (July 1 - June 30) only. It does not include any carryover from the prior year for self-support budgets, if applicable.
- **Organization Budget Summary Form (FWIBSUM)**
This form can be accessed once you have performed a query in FWIBDST. This summary form compares combined expenses to the budget. It summarizes revenue minus labor, expenses, and transfers to provide a high-level status of the budget. This form reflects information for the queried fiscal year (July 1 - June 30) only. It does not include any carryover from the prior year for self-support budgets, if applicable.

Transferring Budgets

The journal voucher process can be used for a variety of different functions. The *journal type code* (often referred to as the *rule code*) determines how the journal voucher is ultimately processed. Refer to the *Banner™ Finance Training Manual* to determine an appropriate journal type code when using the journal voucher process.

- **Journal Voucher Creation Form (FGAJVCD)**
This form can be accessed through the budget menu or the general ledger menu. Use of any of the appropriate **budget** rule codes (or journal types) will result in an adjustment to the adjusted budget column on the Budget Status Form. This form can be used to transfer budget items from one index code to another, to move budget items within a specified index code, and (with authorization) to establish budgets. A general understanding of the fund structure at SOU would be helpful since some restrictions do apply.